



## **Panorama Mass Immunization Worksheet Report**

Purpose: This report generates a client information page for each client in the Mass Immunization event. This information includes client warnings, allergies and AEFI's. In the event Panorama is unavailable this report information would be used by the immunizing nurse for a school event so that immunization can occur.

**This report is not intended for documentation. Immunizations and progress notes will be recorded on the paper forms and will follow post clinic downtime procedures for Panorama entry.**

This report does not include any documentation that is contained in the **NOTES** section of the clients file. Therefore anything that can affect immunization of a client must be captured under client warnings, allergies or AEFI if appropriate.

To run this report in Panorama you need **the event ID** and **date** prior to generating the report.

### **Navigate to**

**Reporting and Analysis** – Left Navigation Panel

### **Reports**

**PNS (you may have to open this up further by clicking the arrow button on the right hand side of the banner)**

**Click directly on PNS2007- not on the radio button next to it**

Enter Event ID and Event Date

Select: **Schedule** Report and the schedule report Details screen will open

- In Box that Has Run Schedule title: you will see name of report. You can change this to reflect the name of the school and the date of the event.
- Specify Schedule run. If you want the report to run immediately leave the check mark next to **Now**. If you would like to schedule the report for a future time click on the checkmark next to **NOW** and then pick your **Run Schedule Date and Start Time**.

You do not need to choose any workgroups requiring access to the report

**Save** - bottom of screen

You will then get a pop up window indicating the report has been successfully scheduled.

At the top of the page press return

**REMINDER:** At this time a second report for pickups can be generated if required.

You will then land back on the main report page.

You can check on the progress of the report but clicking the radio button next to PNS2007- Mass Imms Worksheet. Once this is clicked the View Report Status button is available. If you choose this a window will open. If your report is listed here it is still being generated. If this window is blank your report is completed. Press return to move back to the report screen



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When the report is completed it is available by clicking the radio button next to PNS2007 Mass Imms and then view report History. That will open a window that will show all the reports you have run. Click the radio button next to the report you wish to save and click **View Report Output**. Report should open as a PDF document.

*Note: This report can take **1 hour or longer** to run and should be done **one** day before the clinic. If the report is done earlier than 1 day before the clinic it **will not include any information that has been changed or updated after the running date.***

**Save** a copy of the report to your **Zone Shared Drive**. All users should be able to access this remotely. Clinic Leads should establish a consistent folder to save these reports that are accessible to all Immunizers. For privacy, all reports **must** be saved here and not on individual drives,

Save the report as: **School Name and round # i.e WestSideJrHigh Rd 1** or **School name PU** (pickup) if applicable. Ex WestSideHigh PU

Save a second copy of the report to an **encrypted USB Memory stick**. This is needed if Wi-Fi is down and there is no access to the zone shared drive. The facilitator/ Clinic Lead will copy the report onto computers of all nurse immunizers. A reminder to use the icon on the bottom task bar to remove the USB and protect the data. **“Safely remove hardware and eject media”**

A client can be searched within the report using **CTRL F**

To ensure **Privacy**: All nurse immunizers will delete the report from their computer upon clinic completion. The clinic facilitator/Clinic Lead will delete the report from the shared drive folder and USB stick.

Documentation on the paper consent form will be entered into Panorama by Admin/Data Entry/Clinic Lead when the system is back up and available for use. The clinic facilitator will inform Admin/Data entry post clinic that downtime procedures were used. Progress notes that were written at the clinic will be scanned and uploaded under **Document Management – Context Documents** by the clinic facilitator/ Clinic Lead. A note needs to be made under the notes section to indicate that progress notes are loaded under context documents and the reason why this is.

*Ex Due to Panorama unavailability Progress notes have been loaded under context documents as per SOP Downtime procedures.*

**NOTE: ALL client warnings that would impact future Immunizations and are not already captured in Panorama must be entered under Client warnings when Panorama is available.**

Consent forms will be filed after entry into Panorama according to the Record Retention Policy.

Progress Notes can be shredded after uploading into Panorama as per Document retention SOP for Panorama (draft)